

Streamlining Financial Reporting Between the Diocese and Parishes

Timely and accurate reporting is essential to the operation of a healthy diocese. The ability to identify and address financial issues as they arise hinges on the availability of reliable and timely data from the parishes. Everyone knows financial accountability begins with reliable accurate data, especially for the Diocese of St. Augustine who requires their parishes submit monthly financial reports.

Financial Solution

The Diocese of St. Augustine in Jacksonville, Florida, has been using Parish Data System (PDS) software for over 20 years to manage the needs of their diocesan office. Most of the 51 parishes within the diocese were using PDS Church Office™ and a lot were also using PDS Ledger™. When it came time to find a solution that would streamline financial reporting between their parishes and the diocese, it was an easy decision for St. Augustine. The PDS Financial Solution empowered St. Augustine to review accurate data faster and focus their efforts on analysis instead of data gathering.

Streamlining Financial Reporting

Accounting Systems Supervisor Ronda Stevens explains their choice, “PDS was written for the Catholic Church and our parishes found it very user-friendly. It was also a financial decision to go with a software package that was already being used by so many of our parishes. PDS DioView was the next logical step once we had everyone synchronized on PDS DioOffice™.”

(St. Augustine spent the last year setting up their parishes with DioOffice. DioOffice is part of the PDS Development and Communication Solution™ that enables parishes to synchronize names and addresses with the diocese – ensuring accurate databases and mailings.)



Accounting Systems Supervisor
Ronda Stevens

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Ronda continues, “Our Chief Fiscal Officer requires every parish to send in their financial data monthly. We were having our parishes send their financial data to us using an excel spreadsheet set up to our specifications. This was something that many of our parishes found tedious and time consuming. Not to mention, they would add extra lines so that we would have to rekey their data into the proper format. Now with the

simple mapping process in DioView, the monthly figures are sent to us with a few clicks of the mouse. Everyone loves it.”

Smooth Implementation

It was a smooth implementation process for the diocese to get their parishes submitting reports through the DioView Server. Ronda shares, “The experience has been great. We wanted to involve our parishes as much as possible with the process, so we allowed them to map their own accounts with us overseeing them. We are currently using Webex to manage online meetings, and we watch their screen and talk on the phone as they are mapping their accounts. Approximately, 90% of our parishes are currently submitting their financial reports through the DioView Server.”

Time Saved, Reporting Enhanced

“PDS DioView has given us consistent, accurate data. The frequency of reporting has remained the same, but the ease of adding the data to our database is the real benefit. Without a doubt, DioView has helped save our office time with consolidating parish reports and quickly identifying financial issues. I highly recommend DioView. We have saved so much time at month-end working in DioView. All of the parish’s financials come over in the exact same format. Our CFO can spend more time analyzing the data rather than checking the data for accuracy,” continues Ronda.

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About the Diocese of St. Augustine.

The Diocese of St. Augustine is part of the Roman Catholic Church Latin Rite in Florida and was formally created on March 11, 1870. Part of the Ecclesiastical Province of Miami, its territory includes St. Augustine and Jacksonville. Its current bishop is Victor Galeone.

Website: www.dosafl.com

PDS Products and Services

Products: DioOffice, Ledger, DioView

To learn how DioView can help you streamline financial reporting between your parishes and diocese, visit parishdata.com/dioview.



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